

**Probate Committee
Judicial Conference of Indiana**

June 24, 2005
Minutes

1. Members present. The following members of the committee were present: Larry Bradley, Wayne Lennington, Peter Nemeth, Kathy Smith and Kevin Barton, Acting Chair.
2. Staff present. Michelle C. Goodman provided the committee with staff assistance.
3. Approval of minutes. The Committee approved the minutes from the November 19, 2004 meeting.
4. Legislative Update. The Committee received HEA 1153 dealing with probate and trust matters and legislative summaries produced by the State Bar Section. The Committee was asked to review the bill and identify any revisions or additions that needed to be made to the Deskbook. To accomplish this task, the bill was divided into four parts and the following members volunteered to review a part of the bill: Judge Barton, Com. Bradley, Judge Lennington, and Judge Smith. The Committee discussed whether a section should be added to the Deskbook on trusts. The determination of whether a section on trusts should be added was postponed until the August 19, 2005 meeting. The Committee was asked to provide the draft revisions to Michelle two weeks before the next meeting, which would be August 5th.
5. Report from State Bar Section meeting. A letter summarizing the March Section meeting was distributed to the Committee. It was noted that Judge Cody would not be able to attend the July meeting.
6. Discussion of future projects. The Committee discussed additional topics for the survey to courts. A new area that was raised was consents to transfer and joint accounts.
7. Other business. The Committee discussed a question raised concerning the accounting and the requirement to show receipts. The Committee decided that the statute provided for an exception for the court to permit other proof if receipts were not available (i.e., affidavits) and did not recommend any additional action be taken to address this concern.
8. Next meeting. The Committee discussed the need to adjust the time for the next meeting and it is now scheduled for Friday, August 19, 2005 at 1:30 p.m. at the Judicial Center.

Respectfully Submitted,

Michelle C. Goodman